



Asset Management in Dynamics 365 Finance and Operations

Table of Content

Module 1: Get started with Asset Management for Dynamics 365 Supply Chain Management

- Overview and benefits
- Asset Management terminology and concepts
- Functional locations and assets
- Assets and work orders

Module 2: Work with functional locations in Asset Management for Dynamics 365 Supply Chain Management

- Create functional locations
- Install assets on functional locations
- Functional location lifecycle states

Module 3: Work with assets in Asset Management for Dynamics 365 Supply Chain Management

- Create an asset
- Multi-level assets
- Create assets based on purchase orders
- Asset bills of materials
- Create asset lifecycle states
- Asset counters
- Set up asset management parameters
- Set up asset service levels
- Create maintenance workers and worker groups

Module 4: Manage maintenance requests in Asset Management for Dynamics 365 Supply Chain Management

- Create work orders from maintenance requests
- Asset loans
- Inbound and outbound assets
- Maintenance request management workspace





Maintenance request reports

Module 5: Create and manage work orders in Asset Management for Dynamics 365 Supply Chain Management

- Procurement of work order purchase requisitions
- Bill customers for maintenance work
- Work order report
- Work order pools
- Maintenance checklist template
- Relationships between work order lifecycle models, work order types, and work order lifecycle states
- Work order lifecycle models
- Work order project setup
- Fault management

Module 6: Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management

- Configure workers for work order scheduling
- Schedule and dispatch work orders
- Calculate capacity load on scheduled work orders

Module 7: Use controls and reports in Asset Management for Dynamics 365 Supply Chain Management

- Cost control for assets calculation
- Work order date control calculation
- Work order hour control calculation
- Asset fault cost control calculation
- Calculate asset KPIs

Module 8: Use preventive and reactive maintenance in Asset Management for Dynamics 365 Supply Chain Management

- Assign a maintenance plan to an asset
- Maintenance rounds
- Maintenance schedule
- Maintenance downtime
- Create maintenance request lifecycle states
- Create maintenance request types





Module 9: Work with capacity planning in Asset Management for Dynamics 365 Supply Chain Management

- Calculate capacity load
- Calculate an item forecast

Module 10: Register and report consumption in Asset Management for Dynamics 365 Supply Chain Management

- Register consumption
- Create consumption reports

Module 11: Work with warranties in Asset Management for Dynamics 365 Supply Chain Management

- Warranty agreements
- Warranty on assets and asset types

Module 12: Work with maintenance budgets in Asset Management for Dynamics 365 Supply Chain Management

- Create maintenance budgets
- Update maintenance budgets